

ZOOM Series: Taking Advantage of Volatility in the Banking Environment

Login/Registration: 9:15 AM, CST

Zoom Session: **9:30 – 11:30 AM, CST**

Session 1

May 06: Banking Environment Update and Attracting, Retaining and Adapting Talent During Volatile Times

During this session, we will discuss the following hot topics within the current banking environment:

- Banking outlook update
- Loan modifications and impairment analysis
- Year-end audit and internal control considerations

We will dive into the all-important discussion of attracting and retaining A+ talent by discussing topics including:

- Effectively and proactively communicating with your team
- The importance of defining and communicating the Bank's culture to your team
- Effectively managing your talent during and after COVID-19, while battling new struggles like pandemic fatigue

Warren Averett Speakers



Lisa Berry



Josh Bowen



Scott Bradbary



Paul Perry



Lisa Small

Lisa Berry is a Senior Banking Consultant and Principal in the Firm with more than 36 years of experience in the financial services industry. Lisa's current responsibilities include loan and compliance reviews, Bank Secrecy Act reviews, Fair Lending reviews and Community Reinvestment Act reviews. She is also a consultant for many financial institutions, offering training to their boards and personnel. Lisa's previous banking experience includes correspondent bank lending, branch management and consumer, commercial and real estate lending.

Josh Bowen is a Member in Warren Averett's Audit division and serves on the Firm's Audit best practice leader committee. He also serves in the Firm's Financial Services and Public Sector Industry Groups. He began his public accounting career in 2005 and has provided auditing, attestation and consulting services to a variety of industries; however, he has focused heavily on providing external and internal audits and Bank Secrecy Act (BSA)/Anti-Money Laundering (AML) compliance consulting to financial institutions.

Scott Bradbary is a Member of the Firm and serves as our Chief Talent Officer. Scott works closely with the Firm's Executive and Administration teams to strengthen culture and core values. He has spent his professional career coaching people to success. Scott formerly served as the Chief Learning Officer and member of The Rainmaker Academy and has worked extensively in the accounting profession. He has worked with hundreds of firms and thousands of accountants assisting them to reach their highest potential and professional goals.

Paul Perry has been with the firm since 2004 and is a Member and the practice leader of the Security, Risk and Controls Group. Paul and his team focus on cybersecurity, information technology related projects, risk assessments, internal controls, internal audit and control-related projects, including System and Organization Control engagements. Paul is also the leader of the Firm's Data Analysis Group, a team of individuals within the Firm who provide data analysis solutions to both internal and external clients.

Lisa Small joined Warren Averett in 2019 and is a Compliance Principal in the firm with more than 20 years of experience in the financial services industry. Lisa's current responsibilities include providing consulting services for the Firm's financial institution clients. Lisa also develops new business for the Firm, focusing on the Georgia banking market.

ZOOM Series: Taking Advantage of Volatility in the Banking Environment

Login/Registration: 9:15 AM, CST

Zoom Session: **9:30 – 11:30 AM, CST**

Session 2

May 13: Regulatory Perspectives and Expanding Your Customer Base in a Changing Banking Environment

During this session, we will discuss regulatory hot topics in the current banking environment, including:

- Banking regulatory update
- Auditor and examiner expectations for 2021
- Legislative perspectives

We will explore ways to support and expand the Bank's existing customer base by discussing topics, including:

- Creating a strategy for connecting to Bank prospects
- Proactively communicating with Bank prospects and customers
- Effectively communicating in a virtual environment

Warren Averett Speakers



Lisa Berry



Josh Bowen



Scott Bradbary



Paul Perry



Lisa Small

Lisa Berry is a Senior Banking Consultant and Principal in the Firm with more than 36 years of experience in the financial services industry. Lisa's current responsibilities include loan and compliance reviews, Bank Secrecy Act reviews, Fair Lending reviews and Community Reinvestment Act reviews. She is also a consultant for many financial institutions, offering training to their boards and personnel. Lisa's previous banking experience includes correspondent bank lending, branch management and consumer, commercial and real estate lending.

Josh Bowen is a Member in Warren Averett's Audit division and serves on the Firm's Audit best practice leader committee. He also serves in the Firm's Financial Services and Public Sector Industry Groups. He began his public accounting career in 2005 and has provided auditing, attestation and consulting services to a variety of industries; however, he has focused heavily on providing external and internal audits and Bank Secrecy Act (BSA)/Anti-Money Laundering (AML) compliance consulting to financial institutions.

Scott Bradbary is a Member of the Firm and serves as our Chief Talent Officer. Scott works closely with the Firm's Executive and Administration teams to strengthen culture and core values. He has spent his professional career coaching people to success. Scott formerly served as the Chief Learning Officer and member of The Rainmaker Academy and has worked extensively in the accounting profession. He has worked with hundreds of firms and thousands of accountants assisting them to reach their highest potential and professional goals.

Paul Perry has been with the firm since 2004 and is a Member and the practice leader of the Security, Risk and Controls Group. Paul and his team focus on cybersecurity, information technology related projects, risk assessments, internal controls, internal audit and control-related projects, including System and Organization Control engagements. Paul is also the leader of the Firm's Data Analysis Group, a team of individuals within the Firm who provide data analysis solutions to both internal and external clients.

Lisa Small joined Warren Averett in 2019 and is a Compliance Principal in the firm with more than 20 years of experience in the financial services industry. Lisa's current responsibilities include providing consulting services for the Firm's financial institution clients. Lisa also develops new business for the Firm, focusing on the Georgia banking market.

ZOOM Series: Taking Advantage of Volatility in the Banking Environment

Login/Registration: 9:15 AM, CST

Zoom Session: **9:30 – 11:30 AM, CST**

Session 3

May 20: Risk Management, Cyber Risk and Embracing Change

During this session, we will discuss risk management hot topics in the current banking environment, including:

- Board perspectives and managing a risk program
- Aligning risk appetite to a changing environment
- Effective monitoring of the risk management program
- Cyber risk and vendor management hot topics and risks for 2021

We will explore ways to take advantage of uncertainty and embrace change in the current banking environment, including:

- Proactively preparing your team to embrace and adapt to a changing banking landscape
- Strategies to mitigate threats during inevitable change
- Seizing opportunities during uncertainty
- Analyzing risks and rewards during volatile times

Warren Averett Speakers



Lisa Berry



Josh Bowen



Scott Bradbary



Paul Perry



Lisa Small

Lisa Berry is a Senior Banking Consultant and Principal in the Firm with more than 36 years of experience in the financial services industry. Lisa's current responsibilities include loan and compliance reviews, Bank Secrecy Act reviews, Fair Lending reviews and Community Reinvestment Act reviews. She is also a consultant for many financial institutions, offering training to their boards and personnel. Lisa's previous banking experience includes correspondent bank lending, branch management and consumer, commercial and real estate lending.

Josh Bowen is a Member in Warren Averett's Audit division and serves on the Firm's Audit best practice leader committee. He also serves in the Firm's Financial Services and Public Sector Industry Groups. He began his public accounting career in 2005 and has provided auditing, attestation and consulting services to a variety of industries; however, he has focused heavily on providing external and internal audits and Bank Secrecy Act (BSA)/Anti-Money Laundering (AML) compliance consulting to financial institutions.

Scott Bradbary is a Member of the Firm and serves as our Chief Talent Officer. Scott works closely with the Firm's Executive and Administration teams to strengthen culture and core values. He has spent his professional career coaching people to success. Scott formerly served as the Chief Learning Officer and member of The Rainmaker Academy and has worked extensively in the accounting profession. He has worked with hundreds of firms and thousands of accountants assisting them to reach their highest potential and professional goals.

Paul Perry has been with the firm since 2004 and is a Member and the practice leader of the Security, Risk and Controls Group. Paul and his team focus on cybersecurity, information technology related projects, risk assessments, internal controls, internal audit and control-related projects, including System and Organization Control engagements. Paul is also the leader of the Firm's Data Analysis Group, a team of individuals within the Firm who provide data analysis solutions to both internal and external clients.

Lisa Small joined Warren Averett in 2019 and is a Compliance Principal in the firm with more than 20 years of experience in the financial services industry. Lisa's current responsibilities include providing consulting services for the Firm's financial institution clients. Lisa also develops new business for the Firm, focusing on the Georgia banking market.